



## FILING YOUR 2014-15 FINANCIAL AID APPLICATION

This booklet covers several topics you should review before you apply for financial aid for the Summer 2014, Fall 2014 & Spring 2015 semesters.



**Information needed to apply for Financial Aid**



**Instructions on Filing Your FAFSA online application Filing Your TAP online application**



**Filing Your TAP online application**



**What Is Verification & How Does It Affect You?**



**How to Request a Free IRS Tax Return Transcript**



**How to view your awards online**



### **Collect the needed information to apply File 2013 Income Tax Returns**

You & your spouse (if married) or parents (if dependent) should file 2013 tax returns electronically, if possible. Wait 2-3 weeks, then proceed with the FAFSA filing process outlined below. If you are not required to file income taxes, you may skip this step.

**Collect the applicable following items and documents for you and your spouse (if married) and your parents (if under Financial Aid regulations you are considered a dependent student):**

- Social security number
- Date of birth
- Date of marital status
- Your alien registration/permanent resident number (if you are not a U.S. citizen)
- 2013 Federal tax documents
- NY State (IT-201) tax documents if filed in NY
- 2013 W-2 forms
- Recent bank, stock, real estate & business amounts

## Get Federal PINs for you & one of your parents (if dependent)

- Request Federal PINs at: <http://www.pin.ed.gov>
- If you and a parent already have PINs, use them to sign your application — you can use the same PIN every year



The screenshot shows the homepage of the Federal Student Aid PIN website. At the top left is the logo with the text "START HERE GO FURTHER FEDERAL STUDENT AID". To the right is the title "Federal Student Aid PIN". Below the title is a navigation menu with links: "PIN Home", "Help", "Contact Us", "FAQs", and "About Us". On the left side, there is a vertical menu with options: "Apply For A PIN", "Check PIN Status", "Request A Duplicate PIN", "Access My PIN E-mail", "Change My PIN", "Update My Personal Information", "Disable My PIN", "Reestablish My PIN", and "Activate My PIN". Below this menu are "Helpful Links" including "Student Aid on the Web", "Links to Federal Student Aid Electronic Services", and "FAFSA on the Web". The main content area features a large heading "Welcome to the Federal Student Aid PIN Web site" and a paragraph explaining the site's purpose. A blue box on the right contains the text "Apply For A PIN" and "The PIN Application is for students and parents who want to apply for a Federal Student Aid PIN." with an "APPLY NOW" button. At the bottom, the URL "www.pin.ed.gov" is displayed, along with the date "Site Last Updated: Wednesday, September 28, 2011".

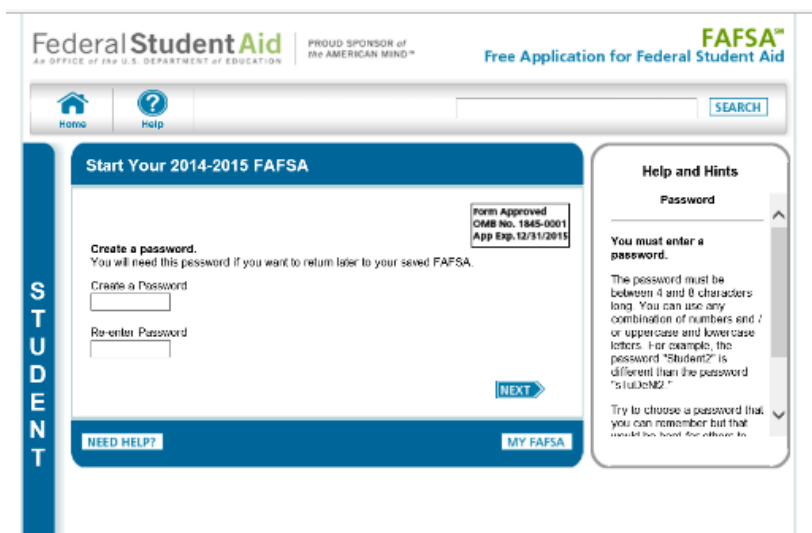
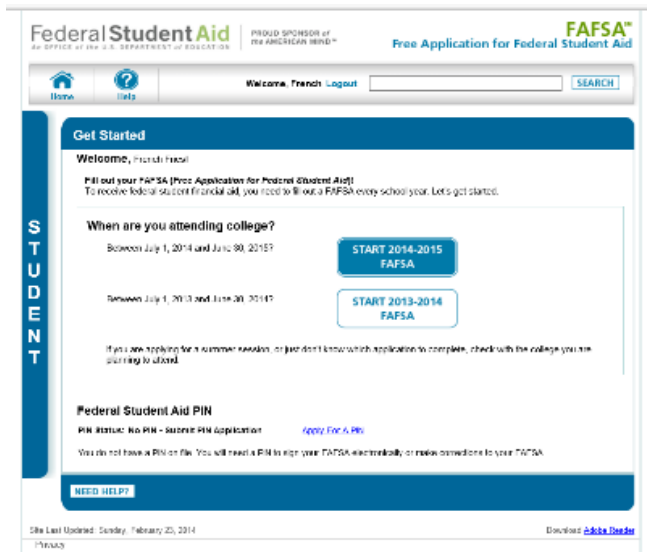


**File your FAFSA on the Web**  
<http://www.fafsa.gov>



The screenshot shows the homepage of the FAFSA website. At the top, it says "Federal Student Aid" and "FAFSA Free Application for Federal Student Aid". Below this is a navigation menu with icons for "Home", "About Us", "PIN Site", "Student Aid on the Web", and "Help". The main heading is "Get help paying for college" with the subtext "Submit a Free Application for Federal Student Aid (FAFSA)". Below this is a banner image showing a group of diverse students. Underneath the banner are two main sections: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a "Login" button and a list of options: "Make a correction", "Add a school", and "View your Student Aid Report (SAR), and more...". At the bottom, there are sections for "Deadlines" and "Announcements". The browser's address bar shows "http://www.fafsa.gov".

- The FAFSA is used to apply for Federal Pell Grant, SEOG, Work-Study and Student Loans



- Select the appropriate Academic Year. If you have applied for FAFSA before, you may be given the option of "Renewal".
- When prompted, create a password. The password you create on this page will be the password you use if you do not submit your FAFSA application and want to continue from where you last saved. Returning users will also be asked to enter their PIN#. If you do not know your PIN# you may also request a duplicate PIN# by clicking on the link titled "I forgot my PIN".
- If you need to return or forward through different pages, use the "previous" & "next" buttons at the bottom right of the page, not the forward or back buttons on your browser.
- Make sure you enter the correct information, review any pre-filled answers and make any necessary changes on the following pages including:
  - Name as it appears on the Social Security card,
  - Address including the apartment #
  - The correct and active e-mail account

## Entering the School Code

Student Demographics	School Selection	Dependency Status	Parent Demographics	Financial Information	Sign & Submit	Confirmation
<b>School Selection</b>						
<div style="border: 1px solid #0056b3; padding: 5px; margin-bottom: 10px;"> <span style="font-size: 1.2em; color: #0056b3; float: left; margin-right: 5px;">i</span> <span style="clear: both;">■ lastnamerapp, based on the information you provided, we have determined that you may qualify for federal student aid. Continue through the application for us to determine how much aid you can receive.</span> </div> <div style="border: 1px solid #0056b3; padding: 5px; margin-bottom: 10px;"> <span style="font-size: 1.2em; color: #0056b3; float: left; margin-right: 5px;">✓</span> <span style="clear: both;">■ Application was successfully saved.</span> </div> <p>You can add up to 10 colleges to your FAFSA. If you know your college's school code, use the option to the right to search. If you need help finding your college, use the state (required), city (optional), and school name (optional) fields to begin your search.</p> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 60%;"> <p>State <input style="width: 100%;" type="text" value="Select"/></p> <p>City <input style="width: 100%;" type="text" value=""/> (optional)</p> <p>School Name <input style="width: 100%;" type="text" value=""/> (optional)</p> <p style="text-align: center;"><input type="button" value="SEARCH"/> <a href="#">Search Tips</a></p> </div> <div style="width: 35%; border-left: 1px dashed #ccc; padding-left: 10px;"> <p>Federal School Code <input style="width: 100%;" type="text"/></p> <p style="text-align: center;">OR</p> <p style="text-align: center;"><input type="button" value="SEARCH"/></p> </div> </div>						

## Hostos CC's Federal School Code: **008611**

- On the School Selection page, you do not need to enter the name and location of the school that you want to receive your FAFSA information if you know the school code. Enter the school code in the "Federal School Code" box towards the right of the page, then click on "SEARCH". After entering a school code, scroll down and you will see the college listed. Select the school and click on "add". You may add up to 10 schools on the FAFSA application. The TAP application can only list one college per semester and will automatically enter the first college listed on your FAFSA which you may change.

### Dependency Status

The Dependency Status page will ask you a series of questions to determine if under Financial Aid regulations you are considered an Independent student. Read the questions carefully before checking "yes" or "no". If you are considered a dependent student, you must provide your parent(s) information regardless if your parent(s) are or are not providing you with shelter or income, or if they do not have a social security #. If you are considered an Independent student you do not need to answer questions about your parents.

### Financial Information

- Make sure you are aware if the questions asked are regarding the student or the parent.
- Do not skip questions or leave any fields unanswered.
- Do not choose "yes" when asked if you would like to skip questions about your assets.
- Unreported income or monetary assistance from someone who provided you with support can be entered as untaxed income or where asked "money received not reported anywhere else on this form" towards the end of the application.

### Using the IRS Data/IRS Link Retrieval Tool

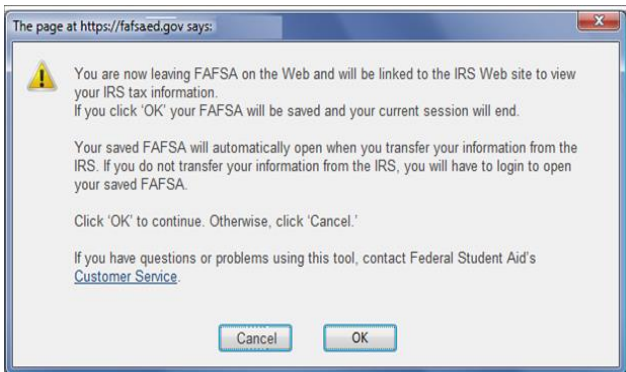
The screenshot shows the "Student Tax Information" section of the FAFSA application. On the left, a vertical blue bar contains the word "STUDENT" in white capital letters. The main content area has a blue header with the text "Student Tax Information". Below the header, a green-bordered box contains a checkmark icon and the text "Application was successfully saved." Below this, there are two dropdown menus: "For 2013, have you completed your IRS income tax return or another tax return?" with "Already completed" selected, and "For 2013, what is your tax filing status according to your tax return?" with "Single" selected. A green icon with a grid pattern is followed by the text: "You may be able to use the [IRS Data Retrieval Tool](#) to view and transfer your tax information from the IRS." Below this are three radio button questions: "Did you file an amended tax return?" (No selected), "Did you file a Puerto Rican or foreign tax return?" (No selected), and "Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?" (No selected). A text box follows: "Based on your response, we recommend that you transfer your information from the IRS into this FAFSA. Enter your PIN and click [Link To IRS](#). What is your PIN?" with an input field and a blue link "[I Forgot/Don't Know My PIN](#)". At the bottom is a blue button labeled "LINK TO IRS". On the right side, there is a "Help and Hints" box with a scroll bar. It contains the text: "Did you file your taxes electronically in the last 3 weeks (or by mail in the last 11 weeks)?" followed by instructions: "If you filed your taxes electronically within the last three weeks, or by mail within the last eleven weeks, select **Yes**; otherwise, select **No**." and "If you filed your taxes within".

The IRS Data Retrieval Tool allows you to transfer tax information from IRS records to your FAFSA. If you & your parent(s) have indicated on your FAFSA that you have already filed 2013 taxes, you may be given the option to use this tool (titled "LINK TO IRS") depending on the filing status of the tax payer. Using this tool is the best option. If you choose not to use this option, or if you use this option but change a pre-filled answer that was "transferred from the IRS", you may be required to submit documentation and additional information to the Financial Aid Office after your application is processed.

**Note:**

- Tax return data and transcripts will be available online in 1<sup>1/2</sup> - 2 weeks from www.irs.gov after a tax return is filed electronically. If taxes were mailed via post office, IRS data be available online in 4-8 weeks.
- For dependent students, there are 2 separate Financial Information sections on the FAFSA. If both the student and parent(s) filed an income tax return, the student's PIN# will be used to IRS link the student's tax information, and parent's PIN# will be used to IRS link the parent's tax information.
- The IRS Link option cannot be used if:
  - Taxes were filed with a tax payer ID instead of a valid social security number issued by the Social Security dept.

If you choose use the tool, you will be transferred to the IRS Website.



On the IRS Website, you will be prompted to enter information as it appears on your tax return.

On the tax return, be aware of:

- How the address was written
- Any capital or lower case letters
- If the apt# was entered on the address box or apt box

The information entered on this IRS webpage is for verification purposes, if the information does not match with IRS records, the data retrieval option may not be used. The name and address you enter on this page will not affect the name and address you entered at the beginning of your FAFSA application.



### Parent <YYYY> Federal Income Tax Information

The information below is your tax information that will help you answer some of the questions on the FAFSA.

	My Tax Information	FAFSA Question Numbers <a href="#">?</a>
Tax Year		
Name (s)	<Joe & Jane>	
Social Security Number	<***-**-6789>	
Filing Status	<Married-Filed Joint Return>	
Type of Tax Return Filed	<1040>	Question <##> on the FAFSA
Adjusted Gross Income	<\$126,721>	Question <##> on the FAFSA
Income Tax	<\$31,400>	Question <##> on the FAFSA
IRS Exemptions	<5>	Question <##> on the FAFSA
Education Credits	<\$2,500>	Question <##> on the FAFSA
IRA Deductions and Payments	<\$2,500>	Question <##> on the FAFSA
Tax-Exempt Interest Income	<\$2,500>	Question <##> on the FAFSA
Untaxed IRA Distributions <a href="#">?</a>	<-\$2,500>	Question <##> on the FAFSA
Untaxed Pensions <a href="#">?</a>	<-\$2,500>	Question <##> on the FAFSA

Print this page for your records before choosing an option below.

#### Transfer My Tax Information into the FAFSA [?](#)

The tax information provided above will populate the answers to the appropriate FAFSA questions. After the FAFSA is populated your IRS session will end and you will return to your FAFSA. Check this box if you are choosing to transfer your information.

Transfer Now [?](#)

#### Do Not Transfer My Tax Information and Return to the FAFSA [?](#)

By clicking the "Do Not Transfer" button, you are choosing not to transfer your tax information electronically. Your IRS session will end and you will return to your FAFSA. You may still use this tax information to input the data into your FAFSA.

Do Not Transfer [?](#)

Once the IRS has authenticated your identity, your IRS tax information will display. You may then choose to transfer your information from the IRS into your FAFSA by selecting the "Transfer My Tax Information into the FAFSA" then clicking "Transfer Now" button.

After you have transferred your data, you will be returned to the FAFSA website to finish your application. Make sure not to change any of the financial data that was "transferred from the IRS". Remember that both you and your parents (if applicable) will need to go through a separate authentication process if you both filed taxes.

**Note:** IRS retrieval option does not fill all the financial information questions on your FAFSA application. You should:

- Click every question box, review and answer them accordingly. There are sections for income from Federal Work study, Internships, Compensatory pay, untaxed income, money received from other sources.
- Do not enter any amounts of Public Assistance (Public assistance budget letters may be requested after the FAFSA has been processed).
- Do not skip or allow the application to skip any questions about assets.
- Use the "Helpful Hints" box to the right of the application for help

After submitting the application, you will be presented with a Confirmation page for your records. On the Confirmation page, you may have the optional feature of [linking to the New York State application \(TAP\)](#).

You can view your FAFSA application results (Student Aid Report or SAR) in 3-10 days by logging into your account at <http://www.fafsa.gov>.



## Applying for New York State Aid (TAP)

If on your FAFSA Confirmation page, you did not use the "Optional Feature — Start your state Application" you may Log in directly at [www.tapweb.ny.gov](http://www.tapweb.ny.gov). Note: if you are not a New York State resident, this option will not be available to you. TAP gives eligible students full-time and part-time tuition awards to supplement federal student aid one may be receiving.

After logging in to your TAP account:

- Review the pre-filled answers on your application, correct any wrong information & answer any questions that are unanswered. For dependent students, if parents are separated before the year 2013, only the information of the parent has custody should be entered.
- If you need to add Hostos on the school section, click on the "search" button, type in "CUNY (a space) Hostos", then click on the prompted Hostos link which will add Hostos to the semester you select.
- You will check the status of your TAP application in 2-4 weeks after completing your application by logging on to <http://www.hesc.ny.gov>. Also verify on your school account that any approved award has been posted.

### **APTS (Aid to Part-Time Study)**

If you plan to attend Hostos CC as a part-time student, you may be eligible for a New York State Aid to Part-Time Study (APTS) award. After completing your New York State TAP application, you will need to complete a CUNY supplement form to be considered for this award.

#### **To complete a "Supplement Form":**

Log on to your CUNY 1st account at [www.hostos.cuny.edu/first](http://www.hostos.cuny.edu/first)

--> Self-service --> student center

--> (In the "Finances" section) supplement Form

**Institution:** For Hostos, you may enter "HOS01" in the box or

--> Click on the magnifying glass

--> (under "search results") select the Academic institution you will attend.

**For Aid Year:** Enter the appropriate year or

--> Click on the magnifying glass

--> (under "search results") select the Academic Year you will attend (2015 represents the Fall 2014 - Spring 2015 academic year).

Complete the displayed online form, do not leave any questions blank/unanswered and click on "submit".

### **FOLLOW UP**

If at least two weeks have passed since you filed your FAFSA or have handed in requested documentation to the Financial Aid office, you should check the status of your application on your online student college account.



## How Can I View My Awards Online?

To view your status online, you must have an application on file with the school code entered on the application. Allow 24-48 hours after you register classes for Financial Aid information to be updated on your CUNY 1<sup>st</sup> account.

Use step (1) to verify if your FAFSA and TAP applications have been processed and have no issues. Use step (2) to see if your awards have been used to pay your balance:

Log on to CUNY FIRST ([www.hostos.cuny.edu/first/](http://www.hostos.cuny.edu/first/))

-->Self Service --> Student Center --> (Under "Finances", click on) "Account Inquiry". Make sure you are reading only the row with correct semester and award year.

-The "Pending aid" column displays the award that has been funded. (To the Right of that column)

-"Total due", will display if you still have a balance. If the "total due" column is blank, it means your balance has been completely covered. Any remaining balance/unpaid tuition should be handled with the Bursar department (room D-B104, 718-518-4373).

If a page stating "you have no outstanding balances" is displayed, click on

-->Activity

You will be able to see charges and payments to your account. Make sure the correct semester and term is selected. To know if you have remaining money from grants, add all amounts on the

"Payment" column, then from that amount, subtract all amounts on the "Charge" column. If the total amount of payments is more than your total charges, you should have a remaining money which can be disbursed to you during the semester.

**For questions about your CUNY 1<sup>st</sup> account, contact the help desk at 718-518-6622/718-518-6646**



## **What Is Verification & How Does It Affect You?**

The federal government uses a process called verification to help determine the correctness of the financial information on your FAFSA. If you are selected for verification, the Financial Aid Office must collect certain documents from you and your family and match them against the information you provided on your FAFSA. If your application needs to be verified, the Financial Aid Office will send you a letter asking you to provide a list of documentation along with some forms for you to fill in order to complete your application process.

Such documentation may include but are not limited to:

Signed copy of IRS tax transcripts, W2 forms, statement from I.R.S. showing proof non-filer of taxes, proof of U.S. citizenship, copy of permanent resident card (front and back), copy of Social Security benefit statement, copy of Budget letter for Public Assistance recipients, copy of food stamp (SNAP) information, proof of registration with Selective Service, copy of Social Security card, copy Birth Certificate, copy of Marriage Certificate.

The requested information varies between applicants.



**Note:**

If IRS Tax Transcripts are one of the required documents needed in order to complete verification, make sure you hand in a transcript from the IRS dept. (www.irs.gov). We can no longer accept copies of tax returns that you or your tax preparer completed. See sample of IRS Transcript, W2 & Verification form below.

You can view instructions on how to order a Return transcript at our website [www.hostos.cuny.edu/ofa](http://www.hostos.cuny.edu/ofa)



This Product Contains Sensitive Taxpayer Data

Request Date:  
Response Date:  
Tracking Number:

Tax Return Transcript

SSN Provided:  
Tax Period Ending:

The following items reflect the amount as shown on the return (PR), and the amount as adjusted (PC), if applicable. They do not show subsequent activity on the account.

NAME(S) SHOWN ON RETURN:  
ADDRESS:

SSN:  
SPOUSE SSN:

Married Filing Joint

FILING STATUS:  
FORM NUMBER:  
CYCLE POSTED:  
RECEIVED DATE:  
REMITTANCE:  
EXEMPTION NUMBER:  
DEPENDENT 1 NAME CTRL:  
DEPENDENT 1 SSN:  
DEPENDENT 2 NAME CTRL:  
DEPENDENT 2 SSN:  
DEPENDENT 3 NAME CTRL:  
DEPENDENT 3 SSN:  
DEPENDENT 4 NAME CTRL:  
DEPENDENT 4 SSN:  
PREPARER SSN:  
PREPARER EIN:

Income

WAGES, SALARIES, TIPS, ETC.:  
TAXABLE INTEREST INCOME: SCH B:  
TAX-EXEMPT INTEREST:  
ORDINARY DIVIDEND INCOME: SCH B:  
QUALIFIED DIVIDENDS:  
REFUNDS OF STATE/LOCAL TAXES:  
ALIMONY RECEIVED:  
BUSINESS INCOME OR LOSS (Schedule C):  
BUSINESS INCOME OR LOSS: SCH C PER COMPUTER:  
CAPITAL GAIN OR LOSS: (Schedule D):  
CAPITAL GAINS OR LOSSES (Form 4797):  
TOTAL IRA DISTRIBUTIONS:  
TAXABLE IRA DISTRIBUTIONS:  
TOTAL PENSIONS AND ANNUITIES:  
TAXABLE PENSION/ANNUITY AMOUNT:  
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E):  
RENT/ROYALTY/PARTNERSHIP/ESTATE (Schedule E) PER COMPUTER:  
RENT/ROYALTY INCOME/LOSS PER COMPUTER:  
ESTATE/TRUST INCOME/LOSS PER COMPUTER:  
PARTNERSHIP/S-CORP INCOME/LOSS PER COMPUTER:  
FARM INCOME OR LOSS (Schedule F):  
FARM INCOME OR LOSS (Schedule F) PER COMPUTER:  
UNEMPLOYMENT COMPENSATION:  
TOTAL SOCIAL SECURITY BENEFITS:



2014-2015 Standard Verification Worksheet  
V1-Dependent Student



Your 2014-2015 Free Application for Federal Student Aid (FAFSA) was selected for review in a process called "Verification". The Financial Aid Office at your college must compare information from your FAFSA with information you provide on this worksheet and with any other required documents. If there are differences, your Financial Aid Office could require additional documentation and/or your FAFSA information may need to be corrected. You may not receive federal financial aid until all verification requirements are met and the necessary corrections made.

**What You Should Do**

- If you or your parent(s) are tax filers, obtain a 2013 IRS Tax Return Transcript for yourself, and your parent(s). The Financial Aid Office cannot accept preparer's copies of the required tax documents. You may obtain an IRS Tax Return Transcript online at [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by phone at 1-800-908-9946. Make sure you request an IRS Tax Return Transcript and NOT an IRS Tax Account Transcript. Important Note: If you used the IRS Data Retrieval tool to transfer your IRS income data into your FAFSA, you may not have to submit the IRS Tax Return Transcript.
- Complete all sections of this worksheet - you and one of your parents must sign the certification (Section F) on page 3 of the worksheet.
- Submit the completed worksheet, tax return transcripts, and any other required documents to the Financial Aid Office at your college.

**A. Student's Information**

Student's Last Name	First Name	M.I.	Student's Social Security Number
Student's Street Address (include apt. no.)			Student's CUNYfirst ID#
City, State, Zip Code			Student's Date of Birth
Student's Phone Number (include area code)			Student's Email Address

**B. Parents' Household Information**

List the people your parents will support between July 1, 2014 and June 30, 2015. Include:  
 - Yourself and your parent(s)  
 - Your parent(s)' other children if (a) your parent(s) provide more than half of their support, or (b) if the other children would be required to provide parental information were they to complete a FAFSA for 2014-2015. Include children who meet either of these standards, even if they do not live with your parent(s).  
 - Other people if they now live with your parent(s), and your parent(s) now provide more than half of their support and will continue to provide more than half of their support through June 30, 2015.

Write the name of the college below for any household member, excluding your parent(s), who will be enrolled, at least half time in a degree, diploma, or certificate program at an eligible postsecondary educational institution any time between July 1, 2014, and June 30, 2015.

*If more space is needed, attach a separate page with student's name and the last 4 digits of student's SSN at the top.*

Full Name	Age	Relationship	College	Will be Enrolled at Least Half Time
Example: Jane Smith	18	Sister	State University	Yes
		Self		

a Control number		OMB No. 1545-0008		This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.			
b Employer identification number		1 Wages, tips, other compensation		2 Federal income tax withheld			
c Employer's name, address, and ZIP code		3 Social security wages		4 Social security tax withheld			
		5 Medicare wages and tips		6 Medicare tax withheld			
		7 Social security tips		8 Allocated tips			
d Employee's social security number		9 Advance EIC payment		10 Dependent care benefits			
e Employee's first name and initial Last name		11 Nonqualified plans		12a See instructions for box 12			
		13 State/retirement/Third-party employee/IRA/Other		12b			
				12c			
				12d			
f Employee's address and ZIP code							
15 State	Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality name	

## **Receiving Payment of Financial Aid**

Financial Aid funds are paid to the student's account electronically after classes have been registered. Remaining funds after tuition is met can be paid to the student by the following disbursement options:

- (1) Direct deposit to your CUNY "Scholar Support Pre-paid Card" (www.cuny.edu --> Financial Aid --> Information and resources --> (to the left) Scholars Support
- (2) Direct deposit to the student's bank account (contact the Bursar's dept.)
- (3) Check mailed to the address entered on the student's FAFSA application

## **For More Information**

Learn more about the opportunities available to finance your college education and other useful information including our office hours and **Financial Aid TV** by visiting Hostos Community College Office of Financial Aid Website at <http://www.hostos.cuny.edu/ofa>

## **File your Financial Aid applications early**

It is always recommended that you file your Financial Aid applications as early as possible. For free assistance from our staff, visit our "Micro lab" Room D-B102 during office hours", make sure to bring all the necessary information needed to apply. .

## **College Contact Information**

Admission's Office: Room D-B210 / A-102, 718-518-4405

Bursar's Office: Room D-B103, 718-518-4373

Registrar's Office: Room D-207, 718-518-6771



### **FINANCIAL AID OFFICE**

**120 Walton Ave Room D-B112, Bronx N.Y. 10451**

**718-518-6555**

**finaid@hostos.cuny.edu**